Introduction

This reference guide is aimed at managers who wish to view or maintain the list of staff who report to them. This ensures the manager receives a notification whenever a staff member reporting to them enters an incident or feedback notification into RiskMan

How can I view the manager/staff relations of a user in RiskMan?

To view the manager/staff relationships in RiskMan navigate to the *Administration -> Manager/Staff -> Staff Hierarchy* page

1. To view the relationships setup for a user in RiskMan

   - Click on the **Filter List** ❶ button and enter your filter criteria e.g. Enter the user's first or last name in the **User Name Filter** ❷ field

   - Once you have entered your filter criteria press **Filter List** ❸
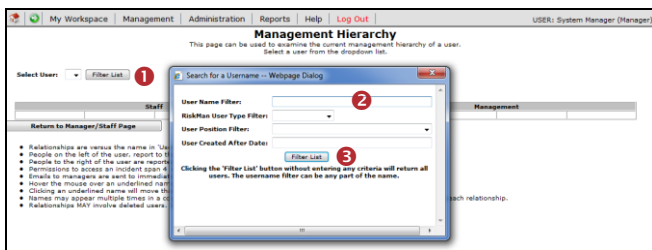
2. Select the user from the **Select User** ❹ drop down list

   - The selected user will appear in the **User** ❺ column
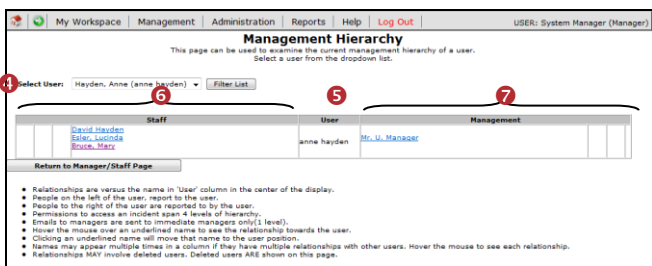
The users listed in the 4 **Staff** ❻ columns to the left of the **User** ❺ either report directly or indirectly to the selected User.

   - If standard Line Manager Notifications are used in RiskMan, the manager in the **User** ❺ column will receive an email notification from any staff listed **directly** to the left of the **User** ❺ column, whenever they enter an incident or feedback notification. If a staff member displayed in any of the other **Staff** ❻ columns enters an incident or feedback notification the **User** ❺ will not be notified by email but will have access to these

notifications in their respective Entered Incidents or Entered Feedback pages

   - If alerts are used to notify a Line Manager of a notification, then the Manager will only have access to incident and feedback notifications from users who **directly** report to them at the time the incident or feedback notification is entered

3. The user in the **User** ❺ column reports directly and indirectly to the users listed in the 4 **Management** ❼ columns

   - If standard Line Manager Notifications are used in RiskMan, the manager/s in the column directly to the right of the **User** ❺ column will be notified by email of any incident or feedback notifications entered by the user in the **User** ❺ column. All other users in the **Management** ❼ columns will have access to the incident and feedback notifications entered by this user but will not be notified by email. They will appear in the manager's respective Entered Incidents or Entered Feedback page

   - If alerts are used to notify a Line Manager of notifications, then only the users listed in the **Management** ❼ column directly to the right of the **User** ❺ column will have access to incident and feedback notifications entered by this user

Can I view the relationships of the users in any of the Staff and Manager columns?

YES - Just click on the user in either the **Management** or **Staff** ❶ columns and that user will appear in the **User** ❷ column. The manager/staff relationships of that user will now appear in the respective **Staff** and **Management** columns
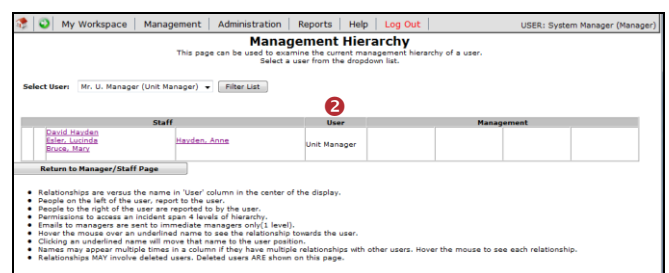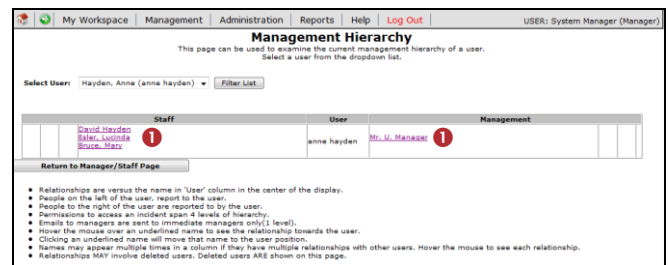
How do I modify the manager/staff relations?

To modify the manager/staff relations from the Management Hierarchy page

- If you are on the **Management Hierarchy** page then press the **Return to Manager/Staff page** ❶ button

- The user displayed in the **User** column will automatically be selected ❷

- To view the staff that report to the selected manager press the **Show Staff** ❸ button
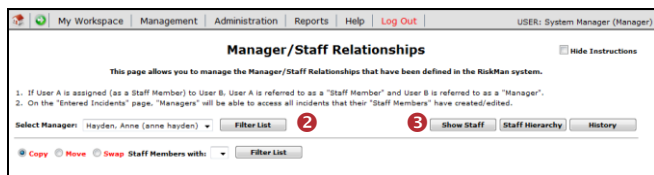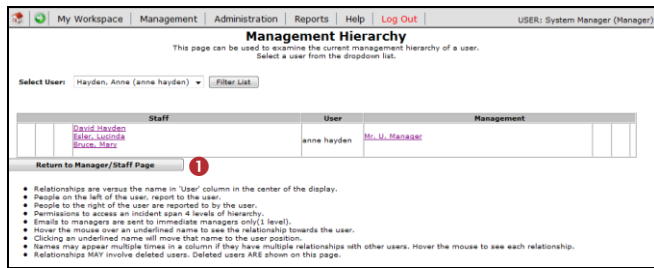
To access the Edit Staff page from the menu

1. Select *Administration -> Manager/Staff -> Edit Staff*

2. The **Manager/Staff Relationships** page will open with a **Filter** window automatically displayed

    - Locate the Manager using **one** of the Filter conditions e.g. Enter the manager's first or last name in the **User Name filter** ❶

    - Press the **Filter List** ❷ button

3. Select the user from the **Select Manager** ❸ list

4. To view the staff that report to the selected manager press the **Show Staff** ❹ button
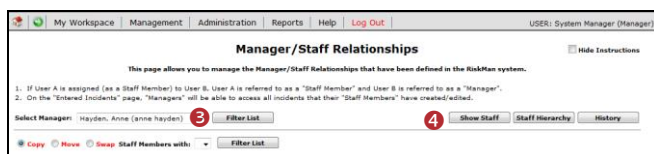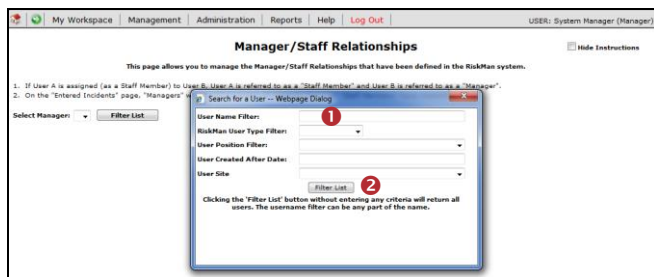
### To show/modify the staff reporting to a selected manager

1. Click on the **Show Staff** button (which will rename to **Hide Staff**)

2. A list of all users reporting to the selected manager will display as well as a list of unassigned users you have permissions to view (dependent on any user restrictions you have in your user profile e.g. site/location restrictions)

3. Users that are flagged as deleted will also display - these users will display with a strike through their name (like this ~~tom smith~~)

To assign staff members to a manager

1. Highlight the user/s in the **User List** ❶ list

2. Press **Add** ❷

3. The user/s will now appear in the **Assigned Staff Members** ❸ list

4. Repeat above steps as required

### To remove staff from the assigned list

1. Highlight the user/s from the **Assigned Staff Members** ❸ list by clicking on the respective tickbox. The row will highlight.

2. Press **Remove** ❹

3. Repeat above steps as required
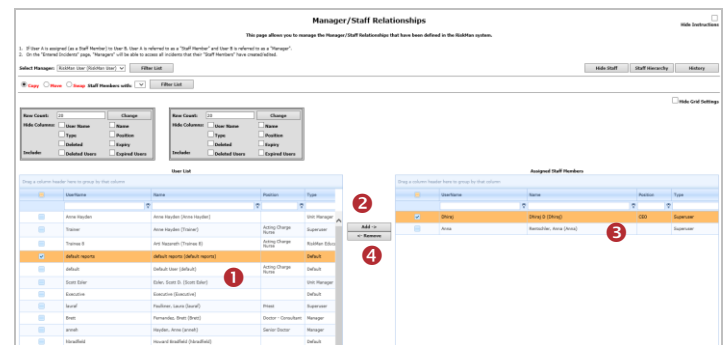
Can I view the history of changes made to the Manager/Staff Relationships?

1. Filter and select the manager from the **Select Manager** ❶ list

2. Press the **History** ❷ button

3. Enter a **date range** ❸ to view the history of changes

4. Press **Show History** ❹

5. A **History** ❺ of changes will display

   Note: The history will show any changes made in the Manager/Staff Relations page and any changes that have been made by users from their Assign Manager page or when submitting an Incident
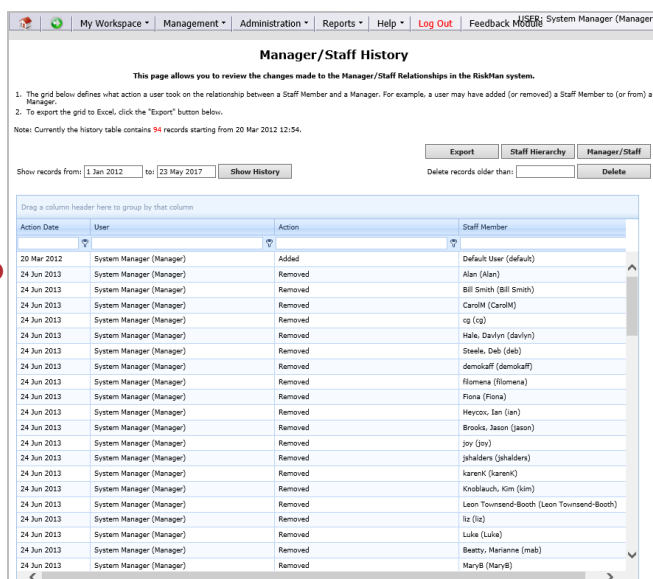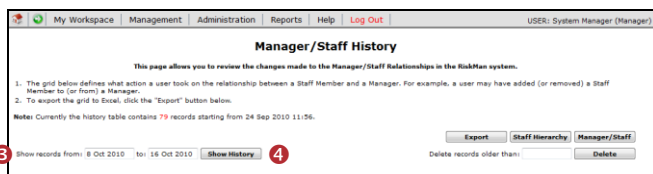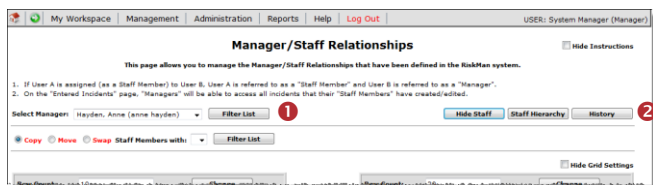
## To export the history of changes to Excel™

1. If you wish to export the history of changes press the **Export** ❶ button

2. The history will be exported to Excel™
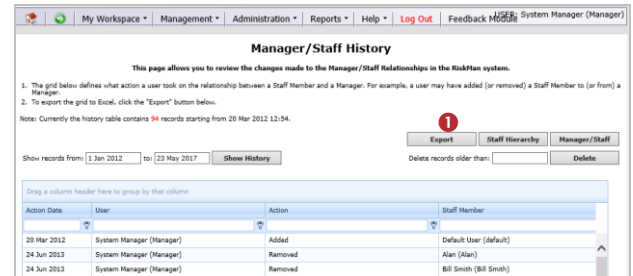
If you wish to delete any of the history on this page

1. Enter the respective date in the **Delete records older than** ❶ field

   *Note: Only history **prior** to the entered date will be deleted e.g. if you select 15/10/10 then all the history prior to the 15/10/10 will be deleted not the history for the 15/10/10*

2. Press **Delete** ❷
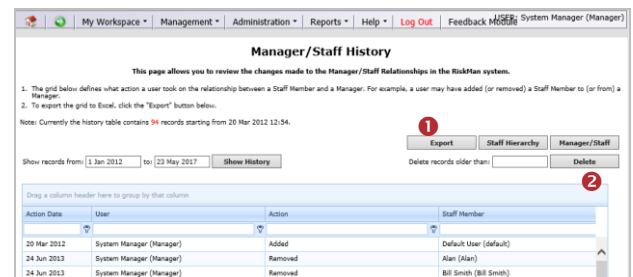
Can I move, copy or swap staff from one manager to another?
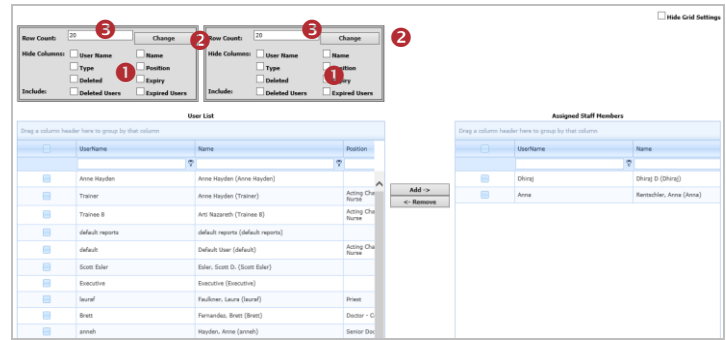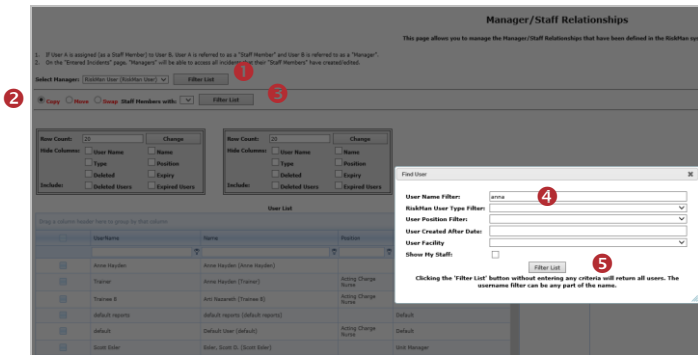
The Manager/Staff Relationships page allows you to

- **Copy** staff reporting to one manager to another

- **Swap** staff reporting to 2 different managers

- **Move** staff reporting to one manager to another

To perform a move, copy or swap function

1. Filter and select the manager you wish to copy, move or swap assigned staff from, by pressing the **Filter List** ❶ button

2. Click on the respective **Copy**, **Move** or **Swap** ❷ button

3. Click on the **Filter List** ❸ button next to the **Staff members with** field

4. Search for the respective manager you are copying, moving or swapping to, using the **User Name filter** ❹ i.e. enter their first or last name and press **Filter List** ❺

5. Select the filtered manager from the **Staff Members With** ❻ list

- A pop-up message will display asking you to confirm the move, copy or swap
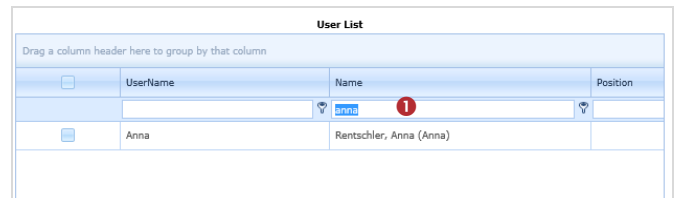
- Press **OK** ❼ to proceed

Configuring the user lists on the Manager/Staff Relationship page

The lists of users in both the **User List** and **Assigned Members List** can be configured as follows

- Hide/Show columns in your lists

- Specify the number of users displayed on one page

- Group your lists via any of the displayed columns

- Filter your lists

To hide columns in your list

1. Check the respective **Hide** ❶ fields

2. Press **Change** ❷

To change the number of rows viewed in a user list

1. Enter the **Row Count** ❸ fields

2. Press **Change** ❷

To filter your user list

1. Select a **comparison test** ❶ from the list of options under the respective column heading

2. Enter the filter criteria under the respective column heading ❷
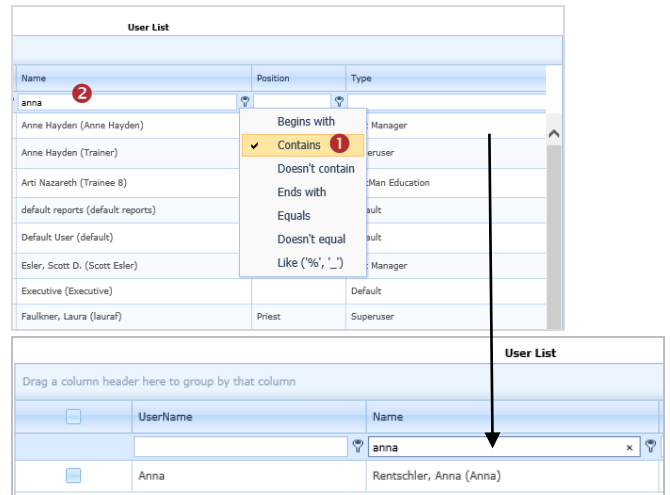
3. Press **Enter**

To remove a filter on your user list

1. Delete the content ❶ of the filter and press **Enter**

To group your user list

1. Click on a column heading and drag to the space provided at the top of your list ❶

2. Release your mouse

To remove your grouping

1. Click on the group heading ❶

2. Drag anywhere in your user list and it will return to its default position

In the example below the list has been grouped by **"Type"** – (the Incident template the users are associated with) with the **Default** template listing collapsed and the other templates expanded